



## OKLAHOMA OFFICE OF WORKFORCE DEVELOPMENT

### OKLAHOMA WORKFORCE DEVELOPMENT ISSUANCE #02-2016

**TO:** Workforce Development Board Chairs  
Workforce Development Board Staff  
Workforce Development Fiscal Agents

**FROM:** Michael Widell, Deputy Secretary for Workforce Development

**DATE:** April 15, 2016

**SUBJECT:** WIOA Youth Title I Program

**PURPOSE:** To provide staff with specific guidelines, policy and procedures required for the implementation of the Workforce Innovation and Opportunities Act (WIOA) Youth Program

**REFERENCES:** The Workforce Innovation and Opportunity Act and the Federal Register/Vol. 80, No 73, Part III-Proposed Rules.

**MESSAGE:** This Oklahoma Workforce Development Issuance (OWDI) is intended to clarify procedures that minimize the burden of documenting eligibility, service provision, and outcomes while remaining respectful of the need to ensure data integrity and report accurate information to the United States Department of Labor (USDOL). All documentation previously copied and kept in paper case files must now be electronically scanned and uploaded to participant records to develop a virtual case file.

### The WIOA Youth Program

WIOA outlines a broad youth vision that supports an integrated service delivery system that leverages resources to support in-school youth (ISY) and out-of-school (OSY) with the primary focus on OSY. The WIOA Youth Program is targeted at young people between the ages of 14-24 to assist them in career guidance/exploration and educational attainment. WIOA funding allows the delivery of services that prepare youth for post-secondary educational and employment opportunities, attainment of educational and/or skills training credentials, and obtainment of employment with career opportunities. To accomplish this, each youth must be assessed to determine skills, interests, needs, and personal goals in order to create an Individual Service Strategy (ISS). This is accomplished in collaboration with the youth to expand the youth's connections to and understanding of the local economy, educational opportunities, and available community resources. This must be coordinated around 14 youth elements which must be made available to every youth participant. Local programs may leverage partner resources to provide program elements as long as the activity is closely connected and coordinated with the WIOA youth program to ensure the activity is of high quality and beneficial to the youth participant. Under WIOA, youth will be determined as either an OSY or an



ISY at the time of enrollment and will remain as such throughout their program participation.

### **Funding Requirements**

The expanded focus on service to OSY requires expenditure rates for the OSY program to increase from 30% to 75%. Administrative funds are limited to 10% of local youth funds and the OSY expenditure rate is calculated after subtracting funds spent on administrative cost. States and/or local areas may spend up to 100% of their funds on out-of-school youth if they choose to do so. States and Workforce Areas that do not meet the 75% expenditure requirement for Program Year (PY) 15 funds must show an increase of out-of-school expenditures over PY14. The minimum allowable expenditure for PY15 must be a minimum increase of 10% compared to PY14 with no lower than a 50% expenditure rate. Local areas must also be prepared to describe how they will achieve the 75% expenditure rate requirement for PY16.

Additionally, under WIOA, opportunities for work experience are an important element of the program. A minimum of 20% of total PY 15 youth formula funds must be spent on work experience activities for ISY and OSY that include an academic and an occupational education component. Work experience activities may include paid and unpaid work experience, summer employment opportunities, job shadowing, on-the-job training, internships, and pre-apprenticeships. The 20% may include all expenses related to work based programs including staffing and curriculum development. The 20% should be calculated after subtracting the funds spent on administrative costs and is not applied separately for ISY and OSY. Funds spent on work experience must be tracked and reported on a monthly basis beginning with PY15.

### **Youth Eligibility and Program Enrollment Procedures**

Program enrollment is the point at which information used in performance begins to be collected. All applicable demographic information pertaining to a youth program participant must be accurately entered in the virtual case management system's Universal Demographics Screen. The demographic information entered will generate a potential eligibility and allow enrollment into the appropriate program. When the enrollment is complete a snapshot of the information that was entered in the universal demographics screen will exist in the program enrollment. The characteristics in the snapshot will remain unchanged throughout program participation. These characteristics will be verified by the participant's virtual self-attestation just prior to staff entering the program enrollment. Only the characteristics used to qualify the youth as eligible for a WIOA program enrollment will require appropriate documentation be uploaded into the participant's virtual case file.

The WIOA Youth Eligibility Form," **Attachment B**, must be filled out completely indicating what criteria and source documents are being used to verify eligibility. The form and the applicable source documents must be uploaded into each participant's virtual case file at the time of the program enrollment.

In addition to documentation supporting program eligibility all youth must provide documentation of:

- Age/Date of Birth;
- Selective Service Registration (if applicable); and
- Eligibility to Work in the United States.

### **Out-of-School Youth Eligibility**

The WIOA Youth Program puts emphasis on out-of-school youth (OSY) between the ages of 16-24. In addition to not attending any school (as defined by state law, Oklahoma Code, Title 70-1-106) eligibility for the WIOA OSY program requires the youth to fall into one of the following categories:

1. Individual with a disability
2. School dropout
3. Not attended school for at least the most recent complete school year calendar quarter
4. A high school graduate who is **low income\*** and either an English language learner or basic skills deficient
5. An offender (juvenile who is or has been subject to any stage of the criminal justice process)
6. A homeless youth or a runaway youth
7. In foster care or has aged out of foster care
8. Pregnant or parenting
9. An individual who requires additional assistance to complete an educational program or to secure and hold employment is an individual who is **low income\*** and meets at least one of the following criteria:
  - With a parent or legal guardian that is currently or previously incarcerated for a felony conviction
  - With a parent or legal guardian who lacks a high school diploma or GED
  - Who attends or has attended chronically under performing schools listed as a priority or targeted intervention school on the State Department of Education website <http://www.ok.gov/sde/priority-schools>

\*The low income requirement applies to the OSY 4<sup>th</sup> and 9<sup>th</sup> categories only. The term low-income also includes a youth that lives in a high-poverty area.

### **In-School-Youth Eligibility**

In-School-Youth (ISY) must be attending school, not younger than 14 or older than 21. Note: Youth who are home schooled or virtual learners are ISY. Youth eligible to be served as ISY must be **low income\*** and fall into one or more of the following categories:

1. Basic skills deficient
2. An English language learner
3. An offender (juvenile who is or has been subject to any stage of the criminal justice process)
4. A homeless youth or a runaway youth
5. In foster care or has aged out of foster care
6. Pregnant or parenting
7. Individual with a disability
8. An individual who requires additional assistance to complete an educational program or to secure and hold employment is an individual who is **low income\*** and meets at least one of the following criteria:
  - With a parent or legal guardian that is currently or previously incarcerated for a felony conviction
  - With a parent or legal guardian who lacks a high school diploma or GED
  - Who attends or has attended chronically under performing schools listed as a priority or targeted intervention school on the State Department of Education website <http://www.ok.gov/sde/priority-schools>

\*The term low-income also includes a youth that lives in a high-poverty area.

**High Poverty Area** - In order to maintain consistency across the country, the USDOL has **proposed** that a high-poverty area be defined as a census tract; a set of contiguous Census tracts; Indian Reservation, tribal land, or

Native Alaskan Village; or a county that has a poverty rate of at least 30 % as set every five years using American Community Survey five year data. <https://www.census.gov/acs/www/data/data-tables-and-tools/data-profiles>

There is a 5% window for non-income eligible ISY only. 5% percent of the total number of ISY served may be non-income eligible as long as they meet other eligibility criteria. The 5% window **does not** apply to OSY.

### **The Enrollment Process**

The enrollment process begins with the participant self-registering in OKJobMatch. When the self-registration has been completed staff must meet with the participant and review the information completed by the participant and gather additional information needed to determine potential eligibility. Most of the information needed to determine eligibility will be completed and entered into the system by staff, in consultation with the participant, after the self-registration is complete.

When an enrollment is entered by front-line staff, the enrollment goes into a pending approval queue for supervisor approval. Enrollments must be approved by a supervisor before there is any expenditure of funds. Enrollments left in a pending status for over 30 days will automatically be denied. Enrollments and eligibility are valid for 30 days only and will not be backdated. Program enrollments denied for being in a pending status for over 30 days must have a redetermination of eligibility and new enrollment completed.

### **Program Design and Service Delivery**

The WIOA youth program places additional emphasis individual participant needs. Career pathways have been incorporated as part of both the objective assessment and the development of the individual service strategy (ISS). Additionally, the ISS must be directly linked to one or more of the performance measures.

**Objective Assessment** of the academic levels, skill levels and service needs of each participant for the purpose of identifying appropriate services and career pathways for youth. The assessment must include a review of the following:

1. Basic Skills
2. Occupational Skills
3. Prior Work Experience
4. Employability
5. Interests and aptitudes
6. Supportive service and developmental needs

A new assessment is not required if it is determined it is appropriate to use a recent assessment conducted pursuant to another education or training program. Objective assessments must be documented as outlined in Attachment A. The assessment is the basis for the establishment of the Individual Service Strategy (ISS).

**Individual Service Strategy (ISS)** must be directly linked to one or more of the performance indicators and identify career pathways that include education and employment, appropriate achievement objectives, and services based on the objective assessment. The ISS is an ongoing strategy jointly developed by the participant and the case manager identifying the participant's educational/employment goals, the appropriate achievement objectives, and the appropriate combination of services for the youth to successfully achieve their goals. The ISS must be reviewed on a regular basis and updated as needed. The ISS should also include:

1. Activities leading to the attainment of a secondary diploma or equivalent or a recognized post-secondary credential.
2. Preparation for post-secondary educational and training opportunities.
3. Strong linkages between academic instruction and occupational education that lead to the attainment of recognized post-secondary credentials.
4. Preparation for unsubsidized employment opportunities if appropriate, and
5. Effective connections to employers, including small employers, that are in in-demand industry sectors and occupations of local and regional labor markets.
6. Documentation of supportive services needed for the participant to successfully meet their educational/employment goal.

The Measurable Skills Gains, Goals and Interests screens will be used to document the components of the ISS. The ISS will be indicated by the date set and tracked by setting a “Goal Type” from the drop down with a status of “Set but Attainment Pending” and entering a “Planned Date of Attainment.” In addition to setting the “Goal Type” case managers must also write detailed information outlining the need for the goal and the plan for successful attainment.

Updates to the ISS goals must be updated as changes occur in the employment, training or needs of the youth change. Prior to the entry of a new ISS goal, any previous goal of the same type must have the status updated as either “Attained” or “Set But Not Attained.” Goal updates must occur when the status of the goal is no longer pending and/or a new goal is set.

WIOA legislation includes 14 program elements, including the original WIA 10 elements condensed into 9, and 5 new program elements. All elements must be included in WIOA Youth program design. While these program elements must be made available to all eligible youth participants between the ages of 14-24, not all elements must be funded with WIOA youth funds. Local programs may leverage partner resources to provide program elements as long as the activity is closely connected and coordinated with the WIOA youth program to ensure the activity is of high quality and beneficial to the youth participant. While local youth programs must make all 14 program elements available to WIOA youth participants, local programs have the discretion to determine which elements to provide to a participant based on the participant’s assessment (ISS). The elements consist of:

1. Tutoring, study skills training, instruction and evidence based dropout prevention and recovery strategies that lead to the completion of a secondary school diploma or its recognized equivalent or for a recognized post-secondary credential. This includes a recognized certificate of attendance or similar document for individuals with disabilities.
2. Alternative secondary school services or dropout recovery services, as appropriate.
3. Paid and unpaid work experience that include academic and occupational education as a component of the work experience. Types of work experience include the following:
  - a. Summer employment opportunities and other employment opportunities available throughout the school year
  - b. Pre-apprenticeship programs which are designed to prepare individuals to enter and succeed in a registered apprenticeship program. Pre-apprenticeship programs must have a documented partnership with at least one registered apprenticeship program

- c. Internships and job-shadowing
- d. On-the-job training opportunities

Work experience should be planned and structured and take place at a workplace for a set period of time. It may be paid or unpaid and may take place in the private for profit sector or the public sector. Labor standard apply in all work experience settings as defined by the Fair Labor Standards Act or state law.

- 4. Occupational skill training, which includes priority consideration for training programs that align with industry sectors or occupations in the local area involved, if the Local Workforce Development Board determines that the programs meet the quality criteria described in WIOA sec. 123. Priority must be given to training programs that lead to recognized postsecondary credentials that align with in-demand industry sectors in the workforce area. Programs must be outcome oriented and focused on a goal set the Individual Service Strategy (ISS) and develop the skills needs to meet the occupational goal in addition to resulting in a post-secondary credential.
- 5. Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.
- 6. Leadership development opportunities, including community service and peer-centered activities encouraging responsibility, employability, self-determination and other positive social and civic behaviors. Expected outcomes of leadership opportunities may include:
  - a. Positive attitude development
  - b. Self-esteem building
  - c. Openness to working with individual from diverse backgrounds
  - d. Maintaining a healthy lifestyle
  - e. Avoiding delinquency
  - f. Postponing parenting
  - g. Maintaining a commitment to academic success
  - h. Keeping informed in community affairs and current events.
- 7. Supportive Services which enable an individual to participate in WIOA activities. Supportive services may include:
  - a. Assistance with transportation, child care, dependent care, housing or educational testing
  - b. Referrals to health care
  - c. Assistance with uniforms, appropriate work attire or other work-related needs
- 8. Adult mentoring for a duration of at least 12 months that may occur both during and after program participation. Adult mentoring must be a formal relationship between a youth participant and adult mentor in which the mentor offers guidance, support and encouragement to develop the competence and character of the youth. The mentor must be an adult other than the assigned case manager.
- 9. Follow-up services are required for not less than 12 months after the completion of activities planned in the ISS. Follow-up services are critical services provided after a youth completes program activities to help ensure the youth is successful in employment and/or post-secondary education and training. Services provided should be based on the needs of the youth therefore the type and intensity of these

services will vary from individual to individual. Follow-up services must include more than an attempted contact made to gather information for reporting purposes. Follow-up services should provide the necessary support to ensure the success of youth post-program.

10. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling, mental health counseling as well as referral to partner programs as appropriate to the needs of the participant.
11. Financial literacy education that is age appropriate and supports the ability of the youth to:
  - a. Create budgets, initiate and maintain balance of checking and savings accounts
  - b. Teach the importance and management of credit, credit reports, credit cards, consumer loan and student loans
  - c. Make informed financial decisions enabling greater financial security and stability
  - d. Protect themselves from and resolve cases of identity theft
12. Entrepreneurial skills training that provides the basics of starting and operating a small business. Youth should learn the basic of how to:
  - a. Seek out and identify business opportunities
  - b. Learn the values of starting and running a business
  - c. Develop a business plan
  - d. Access small loans or grants
  - e. Develop budgets and forecast needs
  - f. Take initiative and market ideas
13. Services that provide labor market and employment information about in-demand industry sector or occupations available in the local area, such as career awareness, career counseling and career exploration services.
14. Activities that help youth prepare for transition to post-secondary education and training based on the youth's objective assessment and ISS.

Each element may be tied to multiple services. All services, including those not funded with Title 1 youth funds, must be documented by entry into the youth's service and training plan as outlined in Attachment A of this policy with the provider of the service documented accordingly. The provider of the service should be the entity, employer or training provider actually providing the service and not the local contracted youth service provider. All services entered must have a correlating program note entry. A program service must be given every 90 days at a minimum. Participants that go over 90 days without a staff assisted program service will exit from the program. Exited participants must have eligibility re-determined and a new enrollment approved to receive additional program services.

*Contact with a participant for case management purposes is and not considered a program service and will not prevent a program exit from occurring.*

### **Indicators of Performance**

1. Placement in Employment, Education or Training:  
The percentage of program participants who are in education, training activities or in unsubsidized employment during the second quarter after exit from the program.

2. Retention in Employment, Education or Training:  
The percentage of program participants who are in education, training activities or unsubsidized employment during the fourth quarter after exit from the program.
3. Earnings after entry into Employment  
Median earnings in the second quarter after exit.
4. Credential/Diploma Rate:  
Attainment of a secondary diploma or equivalent, or a recognized post-secondary credential during participation or within one year after exit from the program.
5. Skills Gain:  
Percentage of participants in education leading to credential or employment during the program year and achieving measurable gains towards the credential or employment.

#### **Documentation**

All characteristics that apply to the client **must** be correctly and accurately entered into the State's virtual case management system and self-attested to by the participant prior to each program enrollment. Basic demographic characteristics not used for eligibility must be verified by **virtual self-attestation**. Characteristics used to determine eligibility **must** be indicated on **Attachment B**, The WIOA Youth Eligibility Form. In addition to **Attachment B**, the documents used to verify eligibility and service provision **must be scanned and uploaded** as outlined in **Attachment A** of this policy.

1. **Self-Attestation** prior to enrollment into the WIOA Youth Program requires that all demographic information entered in the virtual case management system by the client during the self-registration be reviewed for accuracy. In addition, demographic information needed for eligibility determination must be added by the participant and case manager prior to the participant's self-attestation by virtual signature. If the youth is under the age of 18, a parental, guardian or other authorized adult's must sign the virtual signature for self-attestation. *It is imperative that this information be correct prior to the participant's self-attestation.* Self-Attestation occurs when:
  - Staff and participant will review all basic demographic characteristics recorded in the participant's Demographic Snapshot prior to the participant's enrollment into a WIOA funded program. The participant then self-attests that the information reviewed prior to the program enrollment is true and correct by entering a "virtual signature." Staff may at that point proceed to the appropriate WIOA Program enrollment and, after the upload of Attachment B and the documents used to verify eligibility, the entry of the first program service.
  - If it is determined that the demographic characteristics obtained prior to the virtual signature and program enrollment were not accurate, a request for a correction to the snapshot can be made to the Oklahoma Office of Workforce Development. ***If the snapshot is corrected or changed after the initial self-attestation, the participant is required to return to the office and virtually resign the Demographic Snapshot in the virtual case file. The virtual signature can't be done remotely and must be done in the presence of the***



***participant's case manager.***

**2. Staff Verification** of eligibility and/or source documentation in the form of a detailed case note will be allowed for some program services and will be used to comply with some requirements as indicated in **Attachment A** of this policy when:

- Staff reviews allowable source document to determine accuracy of the data being validated and ensures the corresponding data entry match the information on the source document. Staff then records in Program Notes, as indicated in **Attachment A**. The following information *must* be included:
  - a. Specific data element being validated;
  - b. Specific source document used for verification;
  - c. Date the verification occurred, if different from the data entry date; and
  - d. Pertinent information as presented on the source document

**NOTE:** It is required that the staff person verifying the “source” document and information be the one entering the Program Note.

**3. Scanned and uploaded documentation** is required to verify eligibility, data elements and service provision, as indicated in **Attachment A** of this policy. Eligibility must be documented prior to the participant's receipt of any program services. Documentation requirements are met when the following procedures are followed:

- Staff reviews and scans a copy of the appropriate source document used to verify the eligibility/DEV item and uploads the scanned document as outlined in **Attachment A**.

**4. Virtual Case Files** may be used as a source for some criteria if detailed information is provided. For example, the system may be used to verify the date of the first training service if all of the following information is included in the service entry: actual start date, O\*NET-SOC, CIP, Training Agent ID and Training Provider name.

**5. Telephone Verification** is yet another method of documenting eligibility criteria and/or the validity of certain data elements as indicated in **Attachment A**. The information obtained must be documented by completing the sample “Telephone Verification Form for Youth Programs” included as **Attachment D** or a similar board developed form. This form must be scanned and uploaded to the proper screens once complete.

**6. Program Notes** are required each time a participant receives a service, has a service update or outcome, and every time the case manager has contact with the participant. Case notes must be detailed and outline the facts pertaining to participation in the program. Changes in case managers and monitoring functions necessitate accurate and regular documentation of service delivery.

## **I. Types of Validation Rules**

**1. Match** means the document used to verify the information must be exactly the same as the source document outlined in **Attachment A**. The information from the source document must match what has been entered in the case management system. For example, if the allowable source document

is a birth certificate and date of birth is being verified, the date on the birth certificate must be exactly the same date entered in the virtual case file as the date of birth. It should be noted that whenever a date is entered into a virtual case file it must match exactly the date on the document used to verify the information.

2. **Support** means that the information contained in the documentation that was scanned and uploaded, documented in the Service and Training plan or detailed in a case note provides enough information to support the accuracy of the information in the participant's virtual case file.

## II. Specific Program Interpretations

1. **Selective Service Registration** – A male youth between the ages of 18-24 that cannot provide proof of Selective Service registration at the point of program enrollment is not eligible for participation in the WIOA programs and must be referred to the Selective Service for registration. Program enrollment may commence after the registration process has been completed. If a youth is less than 18 years of age at the time of enrollment into the WIOA Youth Program but turns 18 while still receiving WIOA funded services, the Case Manager must verify the youth has registered with Selective Service and document the registration per validation method and data entry requirements outlined in **Attachment A** of this policy. Additional information on the registration process is available at [www.sss.gov](http://www.sss.gov).
2. **Veteran Status and Priority of Service** – Service to veteran youth will follow the Priority of Service guidelines as established under the Veteran's Employment and Training Service (VETS) program. There is a discrepancy between the allowed source documents used to validate veteran status under USDOLETA's WIOA Data Element Validation policy, and verification requirements for participation in the VETS Program, which significantly hinders service delivery under the WIOA Youth Program. Specifically, the VETS Program eligibility allows self-attestation of veteran status with no source documentation to support the claim; whereas a veteran that receives services under WIOA Title I programs, including the Youth Program, must provide a DD-214, a letter from the Veterans Administration or cross-match with veteran data. To maintain compliance with WIOA Title I Data Element Validation and provide veterans with the priority services they deserve, staff should not deny provision of services to a veteran who does not have a document verifying veteran status at the time the service is provided. The service must be given and a program note entered indicating that service was provided in keeping with the Veterans Priority of Service Policy and that the documentation will be obtained when the veteran returns for additional service.
3. **Participant Characteristics: Needs and Barriers** – The virtual case management system will be used as the verification source for participant self-attestation of all demographic characteristics not used for eligibility determinations. All screens must be reviewed with the individual prior to the receipt of the first staff assisted service. Any characteristics that apply to that individual must be correctly and accurately entered prior to self-attestation and the entry of a program enrollment.

**NOTE:** Individuals must have paper or scanned documentation **only** for the characteristics, income status and needs and barriers used to establish eligibility to receive WIOA Youth services. Any characteristics not used to establish eligibility will be verified using self-attestation as the

source.

4. **Disability Status** – Even though WIOA requires that we inquire about an individual’s disability status, additional documentation/validation is not required unless needed for WIOA program eligibility. Customers are asked to *voluntarily respond* to a question about their disability status to comply with Equal Employment Opportunity programmatic eligibility requirements.
5. **Pending Enrollment Queue** - Oklahoma Job Match generates potential program eligibilities based on demographic characteristics entered by the participant during self-registration and expanded eligibilities based on additional characteristics entered by the staff during the intake process. The “potential eligibility” determination and the ability to enroll a client into one of these programs remain valid for 30 days. At the end of 30 days, the client is considered ineligible and the ability to enroll expires. In order to re-determine eligibility, the Demographic Characteristics must be reviewed and updated to ensure that any changes in the client’s status are taken into consideration. Enrollments that are not approved before the 30 day period is over may not be backdated more than 30 days.

When a client is enrolled in the Youth Program, that enrollment enters into a pending queue for supervisor approval prior to the enrollment becoming finalized. The supervisor should verify the client’s eligibility including uploaded documentation, self-attestation and program notes. The supervisor must either approve or deny the enrollment request. When denying the enrollment the supervisor must make a note as to why the enrollment has been denied. The enrollment approval/denial process must take place within 30 days of the enrollment request or the request will be denied by state administrators and eligibility will need to be re-determined. Supervisors should pay special attention to the youth’s date of birth, eligibility date and enrollment date to ensure that the youth has not aged out of eligibility during the time between the determination of eligibility and program enrollment.

*In order to avoid unintentional enrollment denials, the pending list must be worked by a supervisor on a weekly basis.*

### III. **Document Uploader for Paperless Case Management**

Oklahoma Job Match has been programmed with the ability to store scanned PDF documents and attach those documents to the virtual case file of a client receiving youth services. As defined in **Attachment A** of this policy, scanned and uploaded documentation will be required to verify eligibility, DEV, and service delivery. Documents must be scanned and uploaded as a PDF file. Although **complete** participant demographic characteristics must be recorded electronically in the case management system, scanned and uploaded documentation will be required only to verify criteria used for program eligibility, DEV, service delivery, and any other criteria as outlined in **Attachment A** of this policy. Program monitoring of the WIOA Youth program will be completed following the documentation requirements outlined in the policy. Hard copy case files will not be reviewed, all documentation pertaining to eligibility, service delivery must be uploaded and program outcomes must be documented in the exit questions screen and the program outcome screens s indicated by this policy.

**Any information documented directly in the case management system such as case notes, eligibility snapshot, and the service and training plan does not need to be printed out and uploaded. Although**

case notes may be in order to clarify services, the virtual case management system is considered to be the source of the documentation.

**ATTACHMENTS:**

- Attachment A – WIOA Youth Programs Documentation and Uploader Requirements
- Attachment B – WIOA Youth Eligibility Form
- Attachment C – WIOA Youth Support Form
- Attachment D – WIOA Youth Telephone Verification Form
- Attachment E – WIOA Income Calculation Worksheet, Part I and Part II
- Attachment F – WIOA Youth Dropout Status Form
- Attachment G - List of Acceptable Documents to Verify Eligibility to Work
- Attachment H – Youth Training Provider Procurement Form
- Attachment I – Individual Service Strategy (ISS) Client Involvement Statement

**ACTION:** This OWDI is to become a part of your permanent records and made available to appropriate staff.

**RESCISSIONS:** OWDI 02-2014 Data Validation, Program Eligibility and Document Uploader Requirements for the WIA Youth Program, dated March 5, 2014, OETI 17-2009 Youth Common Measures Policy for the WIA Youth Program, and OETI 07-2006, Change I Policy for Youth Assessment and Individual Service Strategy the effective date of this policy.

**INQUIRIES:** If you have any questions or concerns regarding this issuance, please contact Robyn Coman (405) 945-3374, [robyn.coman@osuokc.edu](mailto:robyn.coman@osuokc.edu), Emmit Grayson at (405) 945-3346, [emmit.grayson@osuokc.edu](mailto:emmit.grayson@osuokc.edu). This policy is available at <http://oklahomaworks.gov/policy-center>.

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading / Data Entry Requirements	Required Source Documents
<b>Age/Date of Birth</b>	WIOA requires that Youth Program applicants be between the ages of 16 and 24 at the time of program enrollment.	<p>Verification of “Age/Date of Birth” is required using an acceptable source document. When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify the “Date of Birth” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Baptismal Record</li> <li>• Birth Certificate</li> <li>• DD-214, Report of Transfer or Discharge Paper</li> <li>• Driver’s License</li> <li>• Federal, State, or Local Government ID card</li> <li>• Hospital Record of Birth</li> <li>• Passport</li> <li>• Public Assistance / Social Service Records</li> <li>• School Records or School ID</li> <li>• Work Permit</li> <li>• Cross-match with Department of Vital Statistics</li> <li>• Tribal Records</li> <li>• Court Records</li> </ul>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading / Data Entry Requirements	Required Source Documents
<b>Eligible to Work in the United States</b>	Youth ages 16 and older must be eligible to work in the United States at the time of participation.	<p>Verification of “Eligibility to Work in the United States” is required using an acceptable source document. When verified, staff must:</p> <ol style="list-style-type: none"> <li>Record and/or verify the “SS” in the OSL Universal Demographics screen; and</li> <li>Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p>(documents with expiration dates must be reviewed at subsequent enrollments)</p> <ul style="list-style-type: none"> <li>United States Birth Certificate</li> <li>Native American Tribal Documentation</li> <li>US Passport</li> <li>Verification document(s) from List A of attachment G of this policy</li> <li>Verification document(s) from Lists B <b>and</b> C of attachment G of this policy</li> <li>Naturalization Certificate</li> </ul>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Selective Service</b></p> <p>Males only, 18 years and older.</p>	<p>Section 189 (h) of WIOA requires that a determination of military Selective Service (SS) registration status be made prior to enrollment in WIOA Youth funded programs.</p> <p>All males who are at least 18 years of age and born after December 31, 1959, and who are not in the Armed Services on active duty, must be registered with the SS.</p> <p>Males who cannot provide proof of SS Registration must be referred to the SS for registration.</p> <p><b>Note:</b> If a youth is under 18 years of age at the time of enrollment into the WIOA Youth Program but turns 18 while still receiving WIOA funded services, the Case Manager must verify the youth has registered with Selective Service and document the registration per validation method and OSL requirements outlined in this policy.</p>	<p>Verification of Selective Service is required using an acceptable source document to determine Selective Service registration. When verified, staff must:</p> <ol style="list-style-type: none"> <li>Record and/or verify the “SS” in the OSL Universal Demographics screen; and</li> <li>Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p><b>*Note:</b> Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <ul style="list-style-type: none"> <li>Selective Service Status Information Letter</li> <li>Selective Service Registration Card</li> <li>Selective Service Registration Record (Form 3A)</li> <li>Selective Service Verification Form</li> <li>Stamped Post Office Receipt of Registration</li> <li>US Selective Service Verification (Internet) <a href="http://www.sss.gov">www.sss.gov</a></li> </ul>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>English Language Learner</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>A person who is learning the English Language in addition to his or her native language.</p>	<p>Eligibility Verification that a person is an English Language Learner is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify “English Language Learner” in the OSL Universal Demographics screen; and indicate the participant’s primary language</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• School Records</li> <li>• Case note documenting case manager observation</li> </ul>



Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Eligible Veterans Status</b>	<p>The individual is a person who served in the active U.S. military, for a period of less than or equal to 180 days, and who was discharged or released from such service under conditions other than dishonorable.</p> <p><b>Or</b></p> <p>The individual served on active duty for a period of more than 180 days and was discharged or released with other than a dishonorable discharge; or was discharged or released because of a service connected disability; or as a member of a reserve component under an order to active duty pursuant to section 167 (a), (d), or, (g), 673 (a) of Title 10, U.S.C., served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and was discharged or released from such duty with other than a dishonorable discharge.</p> <p><b>Or</b></p> <p>The individual is a person who is (a) the spouse of any person who died on active duty or of a service connected disability, (b) the spouse of any member of the Armed Forces serving on active duty who at the time of application for assistance under this part, is listed, pursuant to 38 U.S.C 101 and the regulations issued there under, by the Secretary concerned, in one or more of the following categories and has been so listed for more than 90 days:</p> <p>(i) missing in action;</p> <p>(ii) captured in the line of duty by a hostile force;</p> <p>(iii) forcibly detained or interned in the line of duty by a foreign government or power; or</p> <p>(c) The spouse of any person who has a total disability permanent in nature resulting from a service-connected disability or the spouse of a veteran who died while a disability so evaluated was in existence.</p>	<p>Eligibility Verification that a person meets the definition of an eligible veteran is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify "Eligible Veterans Status" in the OSL Universal Demographics screen; and indicate the participant's primary language</li> <li>2. Add a new document to the "Uploaded Documentation Section" of participant's "Case Details" page. Choose the appropriate acceptable source document from the drop down list and choose "Support" as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p><b>*Note:</b> Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <ul style="list-style-type: none"> <li>• DD-214</li> <li>• Letter from the Veterans Administration</li> <li>• Cross-Match with Veterans Data</li> </ul> <p><b>Or</b></p> <ul style="list-style-type: none"> <li>• Program note indicating documentation will be obtained when the veteran returns for additional service.</li> </ul> <p><b>**If a source document is not available at the time a service is provided a program note must be entered indicating that program service was provided in keeping with the Veterans Priority of Service Policy and that the documentation will be obtained when the veteran returns for additional service.</b></p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Runaway Youth</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>A youth under 18 years of age who removes himself/herself from home or place of legal residence without the permission of a parent or guardian.</p>	<p>Eligibility Verification that a person meets the definition of a runaway youth is required using an acceptable source document. When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify "Runaway Youth" in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the "Uploaded Documentation Section" of participant's "Case Details" page. Choose the appropriate acceptable source document from the drop down list and choose "Support" as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Written statement from a Shelter</li> <li>• Written statement from Social Service agency</li> <li>• Telephone Verification Form documenting runaway status (Attachment D)</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Offender</b></p> <p>Criteria may be a reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>If the individual is a person who either is or has been subject to any stage of the criminal justice process for committing a status offense or delinquent act, or requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction for committing delinquent acts, such as crimes against persons, crimes against property, status offenses, or other crimes.</p> <p>A status offense is the illegal behavior of a child (under the age of 18 years old), that if committed by an adult would not be considered a criminal activity, such as truancy, possession and/or consumption of alcohol, curfew violations, and purchase of cigarettes.</p>	<p>Eligibility Verification that a person meets the definition of an offender is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify "Offender" in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the "Uploaded Documentation Section" of participant's "Case Details" page. Choose the appropriate acceptable source document from the drop down list and choose "Support" as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Documents from the Juvenile/Criminal Justice System</li> <li>• Court Documents</li> <li>• Letter of Parole</li> <li>• Letter from Probation Officer</li> <li>• Police Records</li> <li>• Telephone Verification documenting offender status (Attachment D)</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Homeless Individual</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>WIOA Section 101 (25)(D) An individual who qualifies as a homeless individual, as defined in subsections (A) AND (C) of the Stewart B. McKinney Homeless Assistance Act. The McKinney-Vento Homeless Education Assistance Act (42 U.S.C. § 11431-11435) defines homeless children or youth as those individuals who lack a fixed, regular and adequate nighttime residence. The Oklahoma State Department of Education states the following definitions may provide guidance:</p> <p><b>Fixed:</b> A fixed residence is one that is stationary, permanent and not subject to change.</p> <ol style="list-style-type: none"> <li>1. <b>Regular:</b> A regular residence is one which is used on a regular basis.</li> <li>2. <b>Adequate:</b> An adequate residence is one that is sufficient for meeting both the physical and psychological needs typically met in home environments.</li> </ol> <p>This includes any individual who has a primary night time residence that is a publicly or privately operated shelter for temporary accommodation; an institution providing temporary residence for individuals intended to be institutionalized; or a public or private place not designed for or ordinarily used as a regular sleeping accommodation.</p>	<p>Eligibility Verification that a person meets the definition of an Homeless Individual is required using an acceptable source document. When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify "Homeless Individual" in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the "Uploaded Documentation Section" of participant's "Case Details" page. Choose the appropriate acceptable source document from the drop down list and choose "Support" as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Written statement from a Shelter</li> <li>• Written Statement from Social Service agency</li> <li>• Telephone Verification Form documenting current housing status (Attachment D)</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Runaway Youth</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>A youth under 18 years of age who removes himself/herself from home or place of legal residence without the permission of a parent or guardian.</p>	<p>Eligibility Verification that a person meets the definition of Runaway Youth is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify “Runaway Youth” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Written statement from a Shelter</li> <li>• Written statement from Social Service agency</li> <li>• Telephone Verification Form documenting runaway status (Attachment D)</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Pregnant Or Parenting Youth</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>An individual who is either under 22 years of age and who is pregnant, or an individual (male or female) who is providing custodial care for one or more dependents under the age of 18.</p> <p><b>NOTE:</b> Males do not qualify as a parenting youth until the child is born</p>	<p>Eligibility Verification that a person meets the definition of “Pregnant or Parenting Youth” is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify “Pregnant or Parenting Youth” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Program note stating observation of pregnancy status</li> <li>• Child’s birth certificate</li> <li>• Doctor’s note confirming pregnancy</li> <li>• Hospital record of live birth</li> <li>• Court order establishing paternity</li> <li>• Legal/formal custody agreement</li> <li>• Child support order and proof of payment</li> <li>• Most Recent Tax Account Transcript obtained through <a href="http://www.irs.gov">www.irs.gov</a></li> <li>• Social services agency printout/verification showing that child is on applicant’s case</li> <li>• Receipts or other documentation (such as a health insurance or medical card) showing that applicant provides support for child (i.e. food, clothing, shelter, daycare, medical expenses, health insurance, etc.)</li> <li>• Child’ school or daycare records</li> <li>• Medical records</li> <li>• Telephone Verification Form with Social Service Agency verifying pregnant/parenting status</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Basic Literacy Skills Deficient</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>An individual that:</p> <ol style="list-style-type: none"> <li>1. Computes or solves problems, reads, writes or speaks English at or below the 8<sup>th</sup> (8.9 or below) grade level on a generally accepted standardized test or a comparable score on a criterion reference test.</li> <li>2. Is unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family, or in society.</li> </ol> <p><b>Note:</b> Grade level scores below 9.0 (i.e. 8.9) should be considered as "at or below the 8<sup>th</sup> grade level."</p>	<p>. Eligibility Verification that a person meets the definition of "Basic Literacy Skills Deficient" is required using an acceptable source document. When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify "Basic Skills Deficient" in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the "Uploaded Documentation Section" of participant's "Case Details" page. Choose the appropriate acceptable source document from the drop down list and choose "Support" as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Record Test Scores in the appropriate testing fields in the Enrollment Details screen.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Generally Accepted Standardized Test listed in current federal policy within the 6-month period prior to enrollment</li> <li>• A copy of school records documenting testing within the 6-month period prior to enrollment that includes actual scores from a generally accepted standardized test listed in current federal policy.</li> </ul> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>School Dropout</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>An individual who is no longer attending any secondary school and who has not received a secondary school diploma or its recognized equivalent.</p> <p><b>Note:</b> Youth enrolled in alternative schools are not school dropouts.</p>	<p>Eligibility Verification that a person meets the definition of “School Dropout” is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify “School Dropout” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Enrollment Record/Transcripts</li> <li>• Attendance Report</li> <li>• School Documentation/ Letter</li> <li>• Telephone Verification Form – Attachment D (documenting dropout status)</li> <li>• WIOA Youth Dropout Status Form – Attachment F</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>



Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Not Attending School</b></p> <p>Criteria may be a reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>A youth who is in the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter.</p>	<p>Eligibility Verification that a person meets the definition of “Not Attending School” is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify “Not Attending School” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p> *Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Enrollment Record/Transcripts</li> <li>• Attendance Report</li> <li>• School Documentation/ Letter</li> <li>• Telephone Verification Form – Attachment D (documenting dropout status)</li> <li>• WIOA Youth Dropout Status Form – Attachment F</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>In Foster Care or Aged Out of Foster Care</b></p> <p>Criteria may be reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>An individual currently in foster care or has been in the Foster Care system at any point during his/her lifetime.</p>	<p>Eligibility Verification that a person meets the definition of “In Foster Care or Aged Out of Foster Care” is required using an acceptable source document. When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify In Foster Care or Aged Out of Foster Care” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p> *Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Confirmation from Social Service Agency</li> <li>• Court Documentation</li> <li>• Verification of payments made on behalf of the child</li> <li>• Written statement from State or Local agency</li> <li>• Telephone Verification Form- Attachment D (documenting foster care status)</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Requires Additional Assistance</b></p> <p>Criteria may be a reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>An individual who requires additional assistance to complete an educational program or to secure and hold employment. Defined by the State as a low income youth meeting one of the following criteria:</p> <ul style="list-style-type: none"> <li>• With a parent or legal guardian that is currently or previously incarcerated for a felony conviction;</li> <li>• With a parent or legal guardian who lacks a high school diploma or GED; or</li> <li>• Who attends or has attended chronically under performing schools listed as a Targeted Intervention School on the State Department of Education website; or</li> <li>• Attended a school listed as a Focus Designation School on the State Department of Education website.</li> </ul>	<p>Eligibility Verification that a person meets the definition of “Requires Additional Assistance” is required using an acceptable source document. When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify “Requires Additional Assistance” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>• Self-Attestation by virtual signature</li> </ul> <p><b>Documents for Eligibility Verification</b></p> <ul style="list-style-type: none"> <li>• Telephone Verification Form-Attachment D (documenting parent or guardian status)</li> <li>• School Records verifying attendance at Targeted or Focus Designation school listed on the State Department of Education website</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification</p>

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Low Income</b></p> <p>Low income applies to <u>Out of School Youth</u> eligibility <u>only</u> when the individual also either an English Language Learner or an Individual Who Requires Additional Assistance to complete and educational program or hold employment as defined by the State</p> <p>All <u>In-School Youth</u> must be low income in addition to having an identified barrier.</p>	<p>Low Income Individual” Definition</p> <p>An individual who—</p> <ol style="list-style-type: none"> <li>1. receives, or in the past 6 months has received, or is a member of a family* that is receiving or in the past 6 months has received, assistance through the supplemental nutrition assistance program established under the Food and Nutrition Act of 2008 (7 U.S.C. 2011 et seq.), the program of block grants to States for temporary assistance for needy families program under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.), or the supplemental security income program established under title XVI of the Social Security Act (42 U.S.C.1381 et seq.), or State or local income-based public assistance;</li> <li>2. is in a family with total family income that does not exceed the higher of— <ul style="list-style-type: none"> <li>• the poverty line; or</li> <li>• 70 percent of the lower living standard income level;</li> </ul> </li> <li>3. Is a homeless individual (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e-2(6))), or a homeless child or youth (as defined under section 725 (2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a (2)));</li> <li>4. Receives or is eligible to receive a free or reduced price lunch under the Richard B. Russell National School Lunch Act (42 U.S.C. 1751 et seq.);</li> <li>5. is a foster child on behalf of whom State or local government payments are made; or</li> <li>6. Is an individual with a disability whose own income meets the income requirement of clause (ii), but who is a member of a family whose income does not meet this requirement.</li> </ol> <p>(Continued)</p> <p><b>Special Rule</b>—For the purpose of this subsection, the term “low-income”, used with respect to an individual, also includes a youth living in a high-poverty area as defined by the State.</p>	<p>Eligibility Verification that a person meets the definition of “Low Income” is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>1. Record and/or verify “Low Income” in the OSL Universal Demographics screen; and</li> <li>2. Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time</p>	<p><b>SUPPORT</b></p> <p><b><u>For Part ( A), (C),(E) of Definition: (TANF, SSI, SNAP, Tribal Commodities or Foster Child)</u></b></p> <ul style="list-style-type: none"> <li>• Public Assistant or Tribal Assistant Records or</li> <li>• Telephone Verification, <b>Attachment D</b></li> </ul> <p><b><u>For Part (D) of Definition: Homelessness</u></b></p> <ul style="list-style-type: none"> <li>• See <b>page 4</b> of <b>Attachment A</b></li> </ul> <p><b><u>For parts (B) and (F) of Definition: (Income below guidelines)</u></b></p> <ul style="list-style-type: none"> <li>• .Family Size via Self Attestation by Virtual Signature or, if seeking eligibility as a Disabled Family of One, see <b>page 10 of Attachment A</b>; And</li> <li>• WIOA Youth Support Form, <b>Attachment C</b> (if applicable to determine Family Size) And</li> <li>• WIOA Income Calculation Worksheet, <b>Attachment E</b>, with supporting document(s) from list below <u>to document the family’s INCLUDABLE income</u>:</li> <li>• Alimony Agreement,</li> <li>• Bank Statements</li> <li>• Workers Compensation Award Letter</li> <li>• Employer Statement</li> </ul>

	<p><b>Family-</b> means two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:</p> <ul style="list-style-type: none"> <li>(A) A husband, wife, and dependent children.</li> <li>(B) A parent or guardian and dependent children.</li> <li>(C) A husband and wife.</li> </ul> <p>NOTE: Training and Employment Letter (TEGL) 26-13 states “Consistent with the Supreme Court’s Windsor decision and the ETA’s policy of treating all individuals equally, regardless of sexual orientation, ETA interprets gender specific terms of marriage, such as “widow, “ “widower,” “husband,” and “wife,” to include married same-sex spouses</p> <p>Any individual not meeting the above definition of family is considered to be a family of one.</p> <p>The State is providing the following clarifications to the definition of family:</p> <ul style="list-style-type: none"> <li>• “Guardian” refers to an individual related by blood, marriage, or decree of court and/or living in a single residence where the parents are not present in the residence.</li> <li>• The phrase “living in a single residence” includes temporary, voluntary residence elsewhere such as attending school or college, or visiting relatives. It does not include involuntary temporary residence elsewhere, such as incarceration or placement into foster care as result of a court order.</li> <li>• Dependent Youth– Includes those children under the age of 18 or any youth attending secondary school, regardless of age, living with parent(s)/guardian or other responsible adult <u>unless</u> they have children of their own or are legally married.</li> </ul> <p><b>Low Income Family</b>-means a family described in section 3(b)(2) of the United States Housing Act of 1937 (42 U.S.C. 1437a(b)(2))</p>	<p>provided the data elements it verifies are indicated prior to the upload.</p> <p><b>NOTE: Excludable income must be documented but supporting source documents are not required.</b></p>	<ul style="list-style-type: none"> <li>• Family or Business Financial records</li> <li>• Pay stubs</li> <li>• Pension/Retirement Benefit Statement</li> <li>• Quarterly Estimated Tax for Self-Employed Persons</li> <li>• Social Security Disability Insurance Records (SSDI)</li> <li>• Union Benefit Records</li> <li>• Award Letter from Veterans Administration</li> <li>• Insurance or Annuity Statement</li> <li>• Statement of Dividends, Interest, Net Rental, Royalties and/or Lottery/Gambling Winnings</li> </ul>
--	---	---	---

Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Individual with a Disability</b></p> <p>Criteria may be a reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>An individual that:</p> <ol style="list-style-type: none"> <li>Has a physical or mental impairment that substantially limits one or more major life activities;</li> <li>Has a record of such impairment; or</li> <li>Is regarded as having such impairment.</li> </ol> <p>Can be a disabled youth whose family does not meet income eligibility criteria under the Act be eligible for youth services?</p> <p>Yes, even if the family of a disabled youth does not meet the income eligibility criteria, the disabled youth may be considered a low-income individual if the youth's own income (a) meets the income criteria established in WIOA section 101(25) (B); or (b) meets the income eligibility criteria for cash payments under any Federal, State or Local public assistance program (WIOA Section 101(25) (F)).</p> <p><b>Individual with a Disability*</b> – Applicants whose family income exceeds the low-income limit may still qualify for participation in the WIOA program provided that the applicant is an individual with a disability as defined by the Americans with Disabilities Act and has an individual income that does not exceed the greater of the Poverty Line or 70 percent of the Lower Living Standard Income Level.</p> <p><i>Use of Individualized Education Plan (IEP) to Document Disability Status</i> – The State of Oklahoma allows for the use of an Individualized Education Plan (IEP) to document disability status for a youth provided that:</p> <ul style="list-style-type: none"> <li>The IEP used to document is the most current and is not more than 3 years old;</li> </ul> <p>And</p> <p>The IEP clearly documents the individual has a disability; and the disability documented is one that meets the definition set forth by Section 3 of the Americans with Disabilities Act of 1990, as amended (42 U.S.C. 12102).</p>	<p>Eligibility Verification that a person meets the definition of “Individual with a Disability” is required using an acceptable source document</p> <p>When verified, staff must:</p> <ol style="list-style-type: none"> <li>Record and/or verify “Individual with a Disability” in the OSL Universal Demographics screen; and</li> <li>Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload</p>	<p><b>SUPPORT</b></p> <p><b>Basic Demographic Characteristic Requirement</b></p> <ul style="list-style-type: none"> <li>Self-Attestation by virtual signature</li> </ul> <p><b>Program Eligibility Documentation</b></p> <ul style="list-style-type: none"> <li>Letter from Drug or Alcohol Rehab Agency</li> <li>Medical Records</li> <li>Physician’s Statement</li> <li>Psychiatrist’s Diagnosis</li> <li>Social Security Disability Records</li> <li>Department of Veteran’s Affairs Letter</li> <li>Vocational Rehabilitation Letter</li> <li>Worker’s Compensation Record</li> <li>Psychologist’s Diagnosis</li> <li>School Records / IEP</li> <li>Sheltered Workshop Certification</li> <li>OSDE form 9</li> </ul> <p><b>Income Documentation</b></p> <ul style="list-style-type: none"> <li>May use source documents listed above under “Low Income”</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification.</p>


Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Other Public Assistance/ General Assistance</b></p> <p>Note: This is used solely to determine a characteristic of a participant and is <b>NOT</b> meant to be part of a low income determination</p> <p>Criteria may be a reported as a basic Demographic Characteristic Or Used for Eligibility Verification</p>	<p>Participant that <i><b>has received in the previous six months</b></i>, cash assistance or other support services from one of the following:</p> <ul style="list-style-type: none"> <li>Refugee Cash Assistance (RCA);</li> <li>Supplemental Security Income (SSI-SSA Title XVI); or</li> <li>Food Stamp Assistance.</li> <li>General Assistance (GA) (State/local government)</li> </ul>	<p>Eligibility Verification that a person meets the definition of receiving “Other Public Assistance/General Assistance” is required using an acceptable source document When verified, staff must:</p> <ol style="list-style-type: none"> <li>Record and/or verify “Other Public Assistance/General Assistance” in the OSL Universal Demographics screen; and</li> <li>Add a new document to the “Uploaded Documentation Section” of participant’s “Case Details” page. Choose the appropriate acceptable source document from the drop down list and choose “Support” as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload.</li> </ol> <p>*Note: Some documents may be source documents for more than one data element and need only be uploaded one time provided the data elements it verifies are indicated prior to the upload.</p>	<p><b>SUPPORT</b></p> <ul style="list-style-type: none"> <li>Copy of Public Assistance Check</li> <li>State Issued Medical Card</li> <li>Refugee Assistance Records</li> <li>Authorization to Receive Public Assistance</li> <li>TANF Public Assistance Records Telephone Verification Form Attachment D</li> </ul> <p><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification</p>


Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Youth 5% Income Exception</b>	<p>WIOA allows a low-income exception where five percent of all WIOA youth served participant may be participants who ordinarily would be required to be low-income for eligibility purposes to be above the low-income level as long as they meet all other eligibility criteria for youth.</p> <p>A program must calculate the five percent based on the percent of all youth served by the program in the local area's youth program in a given year.</p>	<p>Staff must indicate that the youth meets the requirements for the 5% exception by answering "yes" that the youth falls within the 5% exception category in the low income section of the demographic screens.</p> <p style="text-align: center;">And</p> <p>Ensures the acceptable source document supporting the applicable barrier is scanned and uploaded to appropriate program by choosing <b>"Enrollment"</b> as the item type. Choose the type of Documentation as <b>"Eligibility"</b> and select the data elements that this document upload verifies and upload the document.</p>	<p style="text-align: center;"><b>Barriers</b></p> <p>Acceptable source documents for identified barrier must be uploaded as outlined in this policy.</p> <p style="text-align: center;"><b>And</b></p> <p>If Criteria is used to verify program eligibility, <b>Attachment B, The WIOA Youth Eligibility Form</b> must be completed and uploaded in addition to documents for eligibility verification</p>




Eligibility Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>School Status at Participation</b>	<p>Education Status at Participation can be one of six options:</p> <ol style="list-style-type: none"> <li>1. An individual who is attending any school – including middle (junior high) school, – or is being home-schooled but has not yet received a diploma or its recognized equivalent.</li> <li>2. An individual who is attending alternative school, – but has not yet received a diploma or its recognized equivalent.</li> <li>3. An individual who is not attending school but has received a secondary school diploma or its recognized equivalent.</li> <li>4. An individual who has received a secondary school diploma or its recognized equivalent and is attending a post-secondary school or program, or is between school terms and intends to return to school.</li> <li>5. Not attending any school but is within age of compulsory school attendance</li> <li>6. Dropout – An individual who is not attending any school and has not received a secondary school diploma or its recognized equivalent.</li> </ol>	Participant self-attestation to verify school status at participation is required prior to enrollment into the WIOA Youth Program. Staff reviews the school status with the participant in the OSL Demographic Snapshot. The participant then self-attests that the status is true and correct by entering their virtual signature on the OSL Demographic Snapshot prior to proceeding to the program enrollment.	<p><b>SUPPORT</b></p> <p>Participant self-attestation to school status at participation is required prior to enrollment into the WIOA Youth Program.</p>
<b>Date of Program Enrollment/ First Youth Service</b>	The date of program enrollment must be the same as the date that the participant began receiving any staff assisted services in a physical location funded by the program following the determination of eligibility.	The Program Enrollment Date must be recorded on the OSL Enrollment screen at the time of the first staff assisted service. Staff must ensure that the program enrollment date recorded in OSL reflects the actual date the first staff assisted service was provided and recorded in OSL Service and Training Plan or Quick Service. No further documentation outside of OSL is required.	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• OSL Service &amp; Training Plan</li> <li>• OSL Quick Service</li> <li>• OSL Enrollment Screen</li> </ul>

Service Delivery Documentation and Uploader Requirements

 **Note: All services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy, entered in the Service and Training Plan with progress documented in detailed, regular program notes.**

Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Adult Mentoring</b></p> <p><i>Adult mentoring is one of the 14 elements required by WIOA.</i></p>	<p>The purpose of mentoring is to provide a participant with the opportunity to develop a positive relationship with an adult. The adult mentor should provide a positive role model for educational, work skills, or personal or social development. Mentoring for youth must be categorized as either:</p> <ul style="list-style-type: none"> <li>• Academic (primarily provided to assist youth in achieving academic success);</li> <li>• Employment-related (primarily provided to assist youth in achieving employment-related success); or</li> <li>• Personal or social development-related (primarily provided to assist youth in achieving personal and decision-making skills necessary to become successful members of communities and workplaces.</li> </ul> <p>Adult Mentoring is one of the required 14 program elements and must be for duration of at least twelve months, which may occur both during and after program participation. Mentoring can be a paid or unpaid activity.</p> <p><i>Adult Mentoring services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</i></p> <p> <i>Note: Adult mentors must be appropriately screened and trained (case managers and youth workers are not considered mentors for purposes of meeting the mentoring requirement).</i></p>	<p>All source document(s) supporting adult mentoring must be scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Service and Training Plan entry</p> <p><b><u>And</u></b></p> <p>Detailed Program Note(s) documenting the youth’s activities pertaining to the service.</p>


Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Alternative Secondary School Offerings</b></p> <p><i>Alternative secondary school is one of the 14 program elements required by WIOA.</i></p>	<p>Specialized, structured curriculum offered inside or outside of the school system which may provide work/study and/or General Educational Development (GED) preparation for youth. Alternative secondary school offerings may:</p> <ul style="list-style-type: none"> <li>Lead to a GED;</li> <li>Provide academically rigorous preparation for work and/or post-secondary education;</li> <li>Assist with the transition to work and/or post-secondary education;</li> <li>Be related to the career and/or educational goals of the youth; or</li> <li>Address the youth's barriers to work and/or education.</li> </ul> <p> <b>Note:</b> Alternative Secondary School Offerings provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<p>All source document(s) supporting alternative secondary school offerings must be scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of documentation as "Supporting" and proceed to upload document(s).</p>	<p>Service and Training Plan entry <b><u>And</u></b> Detailed Program Note(s) documenting the youth's activities pertaining to the service.</p>
<p><b>Community &amp; Service Learning Projects</b></p> <p><i>Community &amp; Service Learning Projects are WIOA Leadership Development Opportunity activity encouraging responsibility and other positive social and civic behaviors.</i></p>	<p>Structured workplace or community-based learning experience, through which participants learn and develop by participating in organized community service work activities that meet identified community needs. Community and Service Learning Projects are designed collaboratively by the program and participant(s) to further understanding of course content, acquire a broader appreciation of the discipline, enrich the learning experience, and promote a lifelong civic engagement and enhanced sense of civic responsibility.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul>	<p>Service and Training Plan entry <b><u>And</u></b> Detailed Program Note(s) documenting the youth's activities pertaining to the service.</p>

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Career Planning</b>  <i>Career Planning is a WIOA Leadership Development Opportunity activity.</i>	A system in which individuals evaluate their abilities and interest, consider alternative career opportunities, establish career goals, and plan practical development activities.	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul>	Service and Training Plan entry <b>And</b> Detailed Program Note(s) documenting the youth's activities pertaining to the service.
<b>Civic Engagement Activities</b>  <i>Civic Engagement Activities are WIOA Leadership Development Opportunity activities encouraging responsibility and other positive social and civic behaviors.</i>	Leadership activities which promote the quality of life in a community, such as: <ul style="list-style-type: none"> <li>• Positive attitude development;</li> <li>• Self-esteem building;</li> <li>• Openness to work with individuals from diverse backgrounds;</li> <li>• Maintaining healthy lifestyles, including being drug and alcohol free;</li> <li>• Maintaining positive social relationships with responsible adults and peers;</li> <li>• Contributing to the well-being of one's community, including voting</li> <li>• Making a commitment to learning and academic success;</li> <li>• Avoiding delinquency;</li> <li>• Postponing parenting, including responsible parenting and child support education;</li> <li>• Positive job attitudes and work skills; and</li> <li>• Keeping informed in community affairs and current events.</li> </ul>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul>	Service and Training Plan entry <b>And</b> Detailed Program Note(s) documenting the youth's activities pertaining to the service.

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Comprehensive Guidance and Counseling</b></p> <p><i>Comprehensive Guidance and Counseling is one of the 14 elements required by WIOA.</i></p>	<p>Primarily provided to assist a youth in achieving success in school and at the workplace. Assistance may include drug &amp; alcohol abuse counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth. Services may be provided on an individual or group basis, using a variety of processes and techniques. Is on-going and interactive between both parties and can be a key ingredient for a successful outcome.</p> <p><i>Note: Comprehensive guidance and counseling, drug &amp; alcohol abuse counseling, and referral to counseling must be provided by an appropriately trained and credentialed/licensed counselor. All counseling referrals, and related follow-up, must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</i></p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul>	<p>Service and Training Plan entry <b>And</b> Detailed Program Note(s) documenting the youth's activities pertaining to the service.</p>
<p><b>Exposure to Postsecondary Education Opportunities</b></p> <p><i>Exposure to Postsecondary Education Opportunities is a WIOA Leadership Development Opportunity activity.</i></p>	<p>Exposure to post-secondary education is part of the Leadership Development Opportunity Element, and can be accomplished through tours and by explaining the opportunities available through, (i.e.):</p> <ul style="list-style-type: none"> <li>• Colleges</li> <li>• Technical Schools</li> <li>• Career Pathways Exploration</li> <li>• Oklahoma Career Information System (OKCIS)</li> <li>• Financial Aid Opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul>	<p>Service and Training Plan entry <b>And</b> Detailed Program Note(s) documenting the youth's activities pertaining to the service.</p>


Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Financial Literacy Education</b></p> <p><i>Financial Literacy Education is one of the 14 elements required by WIOA</i></p>	<p>Financial literacy education is a program element that which:</p> <ul style="list-style-type: none"> <li>• Supports the ability of participants to create budgets, initiate checking savings account at banks, and make informed financial decisions;</li> <li>• Support participants in learning how to effectively manage spending, credit and debt;</li> <li>• Teaches participants about the significance of credit reports and credit scores; what their rights are regarding their credit;</li> <li>• Support a participant's ability to understand, evaluated, and compare financial products, service and opportunities and to make informed financial decisions;</li> <li>• Educate participants about identity theft, ways to protect themselves from identity theft and resolve cases of identity theft;</li> <li>• Support activities that address the particular financial literacy need of non-English speakers;</li> <li>• Provide financial education this is age appropriate, timely and provides opportunities to put lessons into practice;</li> <li>• Implement other approaches to help participants gain the knowledge, skills and confidence to make informed financial decisions.</li> </ul> <p>A Federally sponsored financial empowerment toolkit is available at the following link:  <a href="http://www.consumerfinance.gov/your-money-your-goals/">http://www.consumerfinance.gov/your-money-your-goals/</a></p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul>	<p>Service and Training Plan entry  <b>And</b>  Detailed Program Note(s) documenting the youth's activities pertaining to the service.</p>



Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Individual Service Strategy</b>  <i>Individual Service Strategy is a WIOA Leadership Development Opportunity activity encouraging responsibility and other positive social and civic behaviors.</i>	<p>The Individual Service Strategy (ISS) is an ongoing strategy jointly developed by the participant and the case manager, which identifies an age-appropriate employment / career goal, appropriate achievement objectives, and appropriate combination of services for the participant to reach these objectives.</p>	<p>Enter as appropriate:</p> <ul style="list-style-type: none"> <li>• OSL Service and Training Plan</li> <li>• OSL Program Notes</li> <li>• OSL Goals and Interests</li> <li>• OSL Test Screens</li> </ul> <p>And</p> <p>Upload Signed Statement from the ISS Policy</p>	<p>Detailed Program Note(s)</p> <p><b><u>And</u></b></p> <p>Support documentation as defined by local policy/procedure in addition to the signed statement must be uploaded to OSL.</p>
<b>Internship</b>  <i>Internships are part of the paid and unpaid work experience element. This element requires that an academic and occupation component be included.</i>	<p>A period of time spent in business, industry, or other agency for the purpose of providing a student with opportunities to gain insight and direct experience related to one or more functions of the organization. Internships give a student paid or unpaid work experience in a specific career field of study.</p> <p>✍️Note: Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of documentation as "Supporting" and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p><b><u>And</u></b></p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Life Skills Training</b>  <i>Life Skills Training is a WIOA Leadership Development Opportunity activity encouraging responsibility and other positive social and civic behaviors.</i>	<p>Activities and/or training that assist youth to develop marketable work habits. May include modules/training/curriculum instruction in: (a) personal finance and budgeting, (b) computers, (c) parenting/pregnancy prevention, (d) self-leadership (e.g. conflict resolution, public speaking, and anger management), (e) work behavior training, (f) banking, and other training that develops independent living skills.</p> <p>✍️Note: Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable source document(s) supporting life skills training is scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of documentation as "Supporting" and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p><b><u>And</u></b></p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>


Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Job Shadowing</b></p> <p><i>Job Shadowing is part of the paid and unpaid work experience element. This element requires that an academic and occupation component be included</i></p>	<p>Job shadowing is typically a part of career exploration activities. A youth follows an employee at a firm for one or more days to learn about a particular occupation or industry. Youth spend time, one-on-one, with employees doing their job. Businesses and employees who host Job Shadowing go about their regular work while discussing it with the youth. A youth observes the daily routine of an employee and then “interviews” the employee about his/her work and education. Job shadowing can help youth explore a range of careers and specific career objectives in order to select a career pathway. Participating several times a year, youth experience firsthand a variety of careers choices so they can:</p> <ul style="list-style-type: none"> <li>• Understand the daily duties and activities involved with each job and career</li> <li>• Ask questions about the job and workplace</li> <li>• Identify their career interests</li> <li>• Become aware of the technical and academic skills they would need to enter each career</li> <li>• Develop communication skills</li> <li>• Apply a connection between academic classroom work and their career goals.</li> </ul> <p> Note: This is a short-term, one or more days observation type activity. The program could include more than one profession to be shadowed to allow for participant choice.</p> <p>Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable source document(s) supporting job shadowing is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to uploaded document(s).</p>	<p>Detailed Program Note(s)</p> <p><b><u>And</u></b></p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>





Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Objective Assessment</b>	A process that identifies service needs, academic levels, goals, interests, skill levels, abilities, aptitudes, and supportive service needs, and measures barriers and strengths. It includes a review of basic and occupational skills, prior work experience, employability potential and developmental needs. The result of an objective assessment is an individual service strategy.	Enter as appropriate: <ul style="list-style-type: none"> <li>OSL Service and Training Plan</li> <li>OSL Program Notes</li> <li>OSL Goals and Interests</li> <li>OSL Test Screens</li> </ul>	Detailed Program Note(s) <p style="text-align: center;"><b><u>And</u></b></p> Support documentation as defined by local policy/procedure must be uploaded to OSL.
<b>Occupational Skills Training</b>	<p>Basic or advanced training for acquiring skills in a specific occupation. Instruction conducted in an institutional or work site setting designed to provide or upgrade the technical skills and information required to perform a specific job or group of jobs such as auto mechanics, health services, or clerical training. Occupational Skills Training includes job specific competency training and pre-apprenticeship training. Training institutions such as career techs, community colleges, universities, and private training providers provide such training.</p> <p>Individual Training Accounts (ITAs), in lieu of competitive procurement, are allowed to be used for youth ages 18-24. Use of an ITA allows youth the utilized the Eligible Training Provider List in choosing training provider and course of training.</p> <p><i>Training for youth that is not provided through the use of an ITA must be competitively procured with the process documented on Attachment H, Youth Training Provider Procurement Form, of this policy.</i></p> <p>✍️Note: Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>OSL Service and Training</li> <li>Detailed Program Note</li> </ul> <p style="text-align: center;">And</p> <p>The acceptable source document(s) supporting occupational skills training is scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of documentation as "Supporting" and proceed to upload document(s).</p> <p>Regular Program Notes must document the participant's progress including start dates and grades.</p>	<p>Training provided through use of an ITA must have each applicable document uploaded.</p> <ul style="list-style-type: none"> <li>Coordination of Training Funds form</li> <li>Acceptance Letter to Training or other proof of enrollment</li> <li>Individual Training Account Voucher</li> <li>Agreement/Contract with participant</li> <li>Other LWIB defined documents</li> <li>ITA contract modification (if applicable)</li> </ul> <p>•</p> <p>Training provided through the competitive procurement process must have the following documents uploaded</p> <ul style="list-style-type: none"> <li>Attachment H of this policy</li> <li>Other LWIB defined documents</li> </ul>




Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>On-the-Job Training</b>	<p>Training by an employer that is provided to a paid participant while engaged in productive work in a job that: provides knowledge or skills essential to the full and adequate performance of the job;</p> <p>Provides reimbursement to the employer of up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and additional supervision related to the training; and</p> <p>Is limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate.</p> <p> Note: In most cases, on-the-job training is not an appropriate work experience activity for youth participants under age 18.</p> <p>Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) supporting on the job training is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p><b><u>And</u></b></p> <p>All support documentation as defined by local policy/procedure must be uploaded to OSL.</p> <p>Regular Program Notes must document the participant’s progress including start dates and evaluations done by the employer.</p>


Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Organizational and Team Work Training</b>	<p>Training that fosters the development of group or team interaction skills.</p> <p> <b>Note:</b> Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p><b><u>And</u></b></p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Peer Centered Activities</b>	<p>Peer-centered activities consist of activities such as peer mentoring or peer tutoring. Youth learn leadership skills as peer mentors, assistant crew leaders, and receive additional training in leadership.</p> <p> <b>Note:</b> Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p><b><u>And</u></b></p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Pre-Employment Skills/Job Readiness</b>	<p>Pre-Employment Skills/Job Readiness includes but is not limited to creating a resume, job seeking and interviewing skills, understanding employer and workplace expectations, positive work habits (e.g. coming to work on time, getting along with coworkers, etc.), understanding behaviors and attitudes necessary to compete in the labor market, effective coping and problem-solving skills, and other skills as identified that will develop the individual's capacity to move toward employment.</p> <p> <b>Note:</b> Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of documentation as "Supporting" and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Provision of Information on Demand Occupations</b>	<p>Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of documentation as "Supporting" and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Stipend Payment</b>	A Stipend is a fixed regular monetary payment made to a WIOA Youth participant during his/her enrollment to encourage participation in certain activities (seat time payments). The stipend can be used for activities such as classroom instruction. Stipends may be paid based on actual hours of attendance. The guidelines providing stipend payments to youth participants must be described in local policy.	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Study Skills Training</b>	Study skills are strategies and methods of purposeful learning. Study skills training is designed to improve learning ability and may include but is not limited to learning styles, time management, study habits, and listening and writing skills.	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Youth Employment Opportunities</b>	A program for youth operated as part of a comprehensive strategy for addressing the youth’s employment and training needs. The youth employment opportunity may be offered during the summer or throughout the school year. This service provides employment opportunities that must include academic and occupational education. Coordinating with school systems may provide other elements and strategies as appropriate to serve the needs and goals of the participants.	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Supportive Service Child Care</b>	<p>Services that are necessary to enable an individual to participate in activities authorized by WIOA. These services may include if allowable by local policy:</p> <p>Assistance with childcare and dependent care costs.</p> <p> Note: Supportive Services WIOA services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Supportive Service General</b>  <b>Linkages to Community Services</b>  <b>Supportive Service Transportation Assistance</b>  <b>Supportive Service Work Clothing, Equipment, Tools</b>	<p>Services that are necessary to enable an individual to participate in activities authorized by WIOA. These services may include if allowable by local policy:</p> <ul style="list-style-type: none"> <li>• Linkages to community services;</li> <li>• Assistance with transportation costs;</li> <li>• Referrals to medical services; and</li> <li>• Assistance with uniforms or other appropriate work attire and work-related tool costs, including such items as eyeglasses and protective eye gear.</li> </ul> <p> Note: Supportive Services WIOA services provided to youth participants must be appropriate to the needs of the individual youth as defined in their individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Supportive Service Emergency Short Term Housing</b>	<p>Services that are necessary to enable an individual to participate in activities authorized by WIOA. These services may include if allowable by local policy:</p> <p>Assistance with housing costs.</p> <p> Note: Supportive Services WIOA services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>OSL Service and Training</li> <li>Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Training in Decision Making</b>	<p>Includes but is not limited to determining priorities and setting goals.</p> <p> Note: Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>OSL Service and Training</li> <li>Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) supporting training in decision making is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>
<b>Tutoring</b>	<p>Instruction designed to increase basic skills level. Tutoring can be provided as a group activity, one-on-one service or via computer based programs through partnering agencies or workforce centers.</p> <p> Note: Services provided to youth participants must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy and documented in program notes.</p>	<ul style="list-style-type: none"> <li>OSL Service and Training</li> <li>Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable supporting source document(s) supporting tutoring is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Detailed Program Note(s)</p> <p>And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Work Experience</b></p> <p><b>Local Youth programs must expend not less than 20% of the funds allocated to them to provide youth with paid and unpaid youth experience</b></p>	<p>Work experiences for youth are planned, structured learning experiences that take place in a workplace for a limited amount of time. A work experience may be paid or unpaid, and be in the private, non-profit, or public sectors. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act or applicable State law, exists. Work experiences provide the youth participant with opportunities for career exploration and skill development. Work experiences <b>must</b> include academic and occupational education.</p> <p> Note: Work Experience activities must be appropriate to the needs of the individual youth as defined in their Individual Service Strategy</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Note</li> </ul> <p>And</p> <p>The acceptable source document(s) supporting work experience activities is scanned and uploaded as needed to the appropriate program by choosing “Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).</p>	<p>Support documentation <b>must</b> include each of the following documents</p> <ul style="list-style-type: none"> <li>• Worksite Agreement</li> <li>• Trainee Plan</li> <li>• I-9 and W-4 forms</li> <li>• Timesheets</li> <li>• Supervisor Orientation</li> <li>• Trainee Evaluations</li> <li>• Proof of payment (s) to participant</li> </ul>



Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<b>Gap in Service</b>	<p>A participant shall not be considered exited if there is a gap in service of greater than 90 days but no more than 180 days due to one of the following circumstances:</p> <ul style="list-style-type: none"> <li>• A delay before the beginning of training;</li> <li>• Health/medical condition or providing care for a family member with a health/medical condition; or</li> <li>• Temporary move from the area that prevents the individual from participating in services, including National Guard or other related military service.</li> </ul> <p>The gap must be related to one of the above circumstances and can last no longer than 180 days. A consecutive gap in service of up to 180 days following the initial 180 days may be entered if the gap is utilized to resolve the issues that prevented the participant from completing program services that lead to employment.</p>	<p>Staff enters the gap start date and the gap end date in the “Schedule a Service Gap” screen in the program enrollment. Staff must also enter a detailed reason for the gap in service.</p> <p>And</p> <p>A “scheduled” service in the OSL service and training plan must reflect the scheduled service for which the gap was initiated.</p>	<p><b>SUPPORT</b></p> <ul style="list-style-type: none"> <li>• Schedule a Service Gap Link And</li> <li>• Detailed program note(s) And</li> <li>• Scheduled Service in the Service and Training Plan</li> </ul>

Service Delivery Documentation and Uploader Requirements			
Criteria	Definition	Uploading/Data Entry Requirements	Required Source Documents
<p><b>Follow-up Services</b></p> <p>Youth must be made aware at the time of program enrollment that follow-up services are a requirement of program participation and regular contact is required. Reasonable attempts to contact without success must be carefully documented.</p>	<p>One year of follow-up is required by the Workforce Investment Act and enables service providers to help each enrollee to work steadily and advance to better jobs, to maintain regular attendance in post-secondary education and/or training and to continue to grow, mature, and acquire adulthood competencies through participation in youth development activities for a longer period of time. Regular follow-up contact is also needed to obtain information necessary to update program outcomes to meet performance requirement. Service given during follow-up must be based on the needs of the participant and carefully documented. Follow-up services may include:</p> <ul style="list-style-type: none"> <li>a) Leadership development opportunities;</li> <li>b) Supportive services;</li> <li>c) Regular contact with a youth participant's employer, including assistance in addressing work-related problems that may arise;</li> <li>d) Assistance in securing better paying jobs, career development and further education;</li> <li>e) Work-related peer support groups;</li> <li>f) Adult mentoring; and</li> <li>g) Tracking the progress of youth in employment after training.</li> </ul> <p><b>Follow-up services should begin at the point of the last Youth Program service even if the program exit has not occurred</b> and must be appropriate to the needs of the individual youth and documented in program notes and the service and training plan</p>	<ul style="list-style-type: none"> <li>• OSL Service and Training</li> <li>• Detailed Program Notes</li> </ul> <p style="text-align: center;">And</p> <p>All acceptable source document(s) supporting follow-up services must be scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of documentation as "Supporting" and proceed to upload document(s).</p>	<p>Regular and Detailed Program Notes</p> <p>OSL Service and Training Plan</p> <p style="text-align: center;">And</p> <p>Support documentation as defined by local policy/procedure must be uploaded to OSL.</p>

Program Performance & Outcome Documentation Requirements				
Program Outcome	Data Entry Location	Point of Documentation	Documentation Requirements	Verification Sources
<b>Date of Exit</b>	Program Details, Exit Questions	The date of the last service (based on the 90-day exit rule).  Self-Service does not extend exit dates under WIOA.	Staff must accurately record in OSL all services received and the end date(s) associated with all services. When the individual's OSL record indicates that no service funded by any program tracked by the system was recorded for a period of greater than 90 days and there is no gap in service recorded, OSL will automatically exit the individual from the WIOA program (and any other common enrollment program) recording the date of the last service received as the common exit date of all programs.	OSL automatically captures/ records the Exit Date on the program enrollment record
<b>Other Reasons for Exit</b>	Program Details-Exit Questions	The code is entered when a participant is not expected to return in 90 days or more	Staff must record in OSL Exit Questions Screen the Other Reason for Exit when participant did not return to the program for 90 days due to circumstances beyond their control. (This screen is not available for input until the participant has exited the program). Staff must record detailed backup information in OSL Program notes. <b>Example:</b> Participant exited due to need to provide care for critically ill child.	<ul style="list-style-type: none"> <li>Program Exit Questions Screen</li> </ul> <p>And</p> <p>OSL Program Note</p>
<b>Degree Type of Recognized Educational/ Occupational/ Certificate/ Diploma/ Degree Attained</b>	Program Details, Outcomes	This must be recorded when participant has achieved any recognized degree type. This can occur anytime during active program participation or up to 3 quarters after the participant has exited.	OSL Outcomes screen when a participant receives any Type of Recognized Educational/ Occupational/ Certificate/ Diploma/ Degree.  The acceptable source document(s) supporting the attainment must be scanned and uploaded as needed to the appropriate program by choosing "Enrollment" as the item type. Choose the type of Documentation as "Supporting" and proceed to upload document(s).	<ul style="list-style-type: none"> <li>Program Outcomes Screen</li> <li>Program Notes</li> </ul> <p>And</p> <ul style="list-style-type: none"> <li>Certificate</li> <li>Diploma</li> <li>Degree</li> </ul>
<b>Entered Training-Related Employment</b>	Program Details, Exit Questions (This screen is not available for input until the participant has exited the program.)	When participant has exited the program of enrollment	Staff must answer all questions applicable to the participant in the "Upon Exit and Job Placement" section of the Exit Questions Screen	<ul style="list-style-type: none"> <li>OSL Exit Questions</li> </ul>

Program Performance & Outcome Documentation Requirements				
Program Performance	Data Entry Location	Point of Documentation	Documentation Requirements	Verification Sources
<b>In Employment, Education or Training in the 2<sup>nd</sup> quarter after exit.</b>  <b>Measured in the second quarter after exit</b>	Program Details, Outcomes, 2 <sup>nd</sup> quarter after exit	<p>The participant must be enrolled in education or training activities or working in unsubsidized employment during the 2nd quarter after exit to count as a positive outcome.</p> <p>Any education enrollment, including secondary and post- secondary are counted as long as still active during the 2<sup>nd</sup> quarter after exit.</p>	<p>Employment in this quarter will be automatically captured from wage record data.</p> <p>Program outcomes must be answered and follow-up contact with participant maintained so updates on training status can be made.</p>	<p>Program Outcomes must be updated And Detailed Program Notes must be made</p>
<b>In Employment, Education or Training in the 4<sup>th</sup> quarter after exit.</b>	Program Details, Outcomes, 4 <sup>th</sup> quarter after exit	<p>The participant must be enrolled in education or training activities or working in unsubsidized employment during the 2nd quarter after exit to count as a positive outcome.</p> <p>Any education enrollment, including secondary and post- secondary are counted as long as still active during the 2<sup>nd</sup> quarter after exit. Employment in this quarter will be automatically captured from wage record data</p>	<p>Employment in this quarter will be automatically captured from wage record data.</p> <p>Program outcomes must be answered and follow-up contact with participant maintained so updates on training status can be made.</p>	<p>Program Outcomes must be updated And Detailed Program Notes must be made</p>
<b>Median Earnings 2<sup>nd</sup> quarter after exit</b>	Program Details, Wages	Median earning of participants in unsubsidized employment during the 2 <sup>nd</sup> quarter after exit	Wages in this quarter will be automatically captured from wage record data	UI Wage Records

Program Performance & Outcome Documentation Requirements				
Program Performance	Data Entry Location	Point of Documentation	Documentation Requirements	Verification Sources
<b>Credential or Diploma Rate</b>	Program Details, Outcomes	Rate of youth participants who obtain a recognized post-secondary credential or high school diploma during participation or within 1 year after program exit	Program outcomes must be answered and follow-up contact with participant maintained so updates on training outcomes can be made.	Program Outcomes must be updated And Detailed Program Notes must be made
<b>Skills Gain Measured in real time</b>	Program Details, Enrollment, Measurable Skills Gains, Goals and Interests	Percentage of participant in education leading to a credential or employment during the program year, achieving measurable gains toward the credential or employment.	<p>Add the date set and choose Educational Achievement, Post-Secondary Transcript/Report Card, Training Milestone or Skills Progression from the Skills Gain drop down. Set status to "Set but Attainment Pending" and enter the "Planned Date of Attainment. Document a detailed description of the methods or activities that will be utilized to achieve the skills gain and document the applicable services in the Service and Training Plan.</p> <p>To verify attainment add a new document to the "Uploaded Documentation Section" of participant's "Case Details" page. Choose the appropriate acceptable source document from the drop down list and choose "Support" as the document type. Select the program that this document then the data element being verified. Name the source document and complete the upload</p>	<p>Enrollment Details, Measurable Skills Gain.</p> <p>Service and Training Plan</p> <p>And</p> <p>Status must be updated to reflect either "Attainment" or "Set but not Attained" with attainment verified with applicable uploaded document(s).</p> <ul style="list-style-type: none"> <li>• Diploma or Certificate</li> <li>• School Transcript or Report Card</li> <li>• Materials or testing documents verifying skills progression</li> </ul>

## WIOA Youth Eligibility Form

IDENTIFYING INFORMATION			
Applicant's Name:	Last	First	MI
Participant ID:		Application Date:	

### General Eligibility – Verify all of the following criteria.

CRITERIA	IDENTIFY SOURCE DOCUMENT(S)
1. Age / Date of Birth	
2. Citizenship / Eligible to Work	
3. Selective Service Registration <sup>1</sup>	<input type="checkbox"/> N/A – female <input type="checkbox"/> N/A – male under 18

### Out of School Youth must be between the ages of 16 and 24, not attending any school, and meet one of the following criteria:

CRITERIA	IDENTIFY SOURCE DOCUMENT(S)
	(source document must be uploaded)
1. Has a disability	
2. School Dropout	
3. Not attended school for at least the most recent calendar quarter	
4. High school graduate who is low-income and either an English language learner or basic skills deficient.	
5. Homeless or runaway youth	
6. In foster care or aged out of foster care	
7. Pregnant or parenting	
8. * <b>Low income</b> and requires additional assistance to enter or complete an educational program or to secure or hold employment as defined by the State/	

### In Youth must be attending school, not younger than 14 or older than 21, low income, and meet one of the following criteria:

CRITERIA	IDENTIFY SOURCE DOCUMENT(S)
	(source document must be uploaded)
1. Basic Skills Deficient	
2. English language learner.	
3. 14-21 who is subject to the juvenile or adult justice system.	
4. Homeless or runaway youth	
5. In foster care or aged out of foster care	
6. Pregnant or parenting	
7.. Has a disability	
8. Requires additional assistance to enter or complete an educational program or to secure or hold employment.	

## WIOA Youth Support Form

## IDENTIFYING INFORMATION

Applicant's Name:

Last

First

MI

Participant ID:

Application Date:

☐ I HAVE HAD LITTLE OR NO INCOME OR I AM A MEMBER OF A FAMILY THAT HAS HAD LITTLE OR NO INCOME FOR THE 6-MONTH PERIOD PRIOR TO APPLICATION.

1. What is your household's monthly grocery bill? \_\_\_\_\_

How does your household pay for this expense? \_\_\_\_\_

2. What are your household's monthly housing expenses (include rent and utilities)? \_\_\_\_\_

How does your household pay for this expense? \_\_\_\_\_

3. What are your household's monthly transportation expenses (car payment, gas, bus, etc.)? \_\_\_\_\_

How does your household pay for this expense? \_\_\_\_\_

4. What is the average monthly cost for clothing and shoes for your household? \_\_\_\_\_

How does your household pay for this expense? \_\_\_\_\_

5. What are your household's monthly entertainment expenses? \_\_\_\_\_

How does your household pay for this expense? \_\_\_\_\_

☐ I LIVE WITH MY PARENTS/GUARDIAN OR OTHER RESPONSIBLE ADULT BUT AM INDEPENDENT BECAUSE:

☐ I am an orphan or ward of the court or was a ward of the court until I reached the age of 18 (attach documentation).

☐ I am a veteran of the Armed Forces of the United States (attach documentation).

☐ I am a graduate or professional student (in college, beyond a bachelor's degree) (attach documentation).

☐ I am a married individual (attach documentation).

☐ I have legal dependents other than a spouse (attach documentation).

☐ I am a student for whom a financial aid administrator made a documented determination of independence (attach documentation).

☐ I provide more than 50% of my own support (complete questions below).

☐ I am 18 and not attending secondary school.

1. During this time period, for what items (rent, utilities, food, insurance, clothing, etc.) did your parents pay? \_\_\_\_\_

What is the total approximate cost of these items? \_\_\_\_\_

2. During this time period, for what items (rent, utilities, food, insurance, clothing, etc.) did you pay? \_\_\_\_\_

What is the total approximate cost of these items? \_\_\_\_\_

3. What is the approximate percentage of support that you provided?

Total cost of items you paid for: \_\_\_\_\_

Total cost of all items paid for: \_\_\_\_\_

X

100

=

%

4. Do you provide more than 50 percent of your own support according to these calculations? ☐ Yes ☐ No

I ATTEST THAT THE INFORMATION STATED ABOVE IS TRUE AND ACCURATE, AND UNDERSTAND THAT THE ABOVE INFORMATION, IF MISREPRESENTED, OR INCOMPLETE, MAY BE GROUNDS FOR IMMEDIATE TERMINATION FROM THE PROGRAM, REPAYMENT OF ANY FUNDS EXPENDED ON THE PARTICIPANT, AND/OR OTHER PENALTIES AS SPECIFIED BY LAW.

Applicant Signature

Date

Parent/Guardian or Other Responsible Adult Signature

Date

Case Manager Signature

Date

**WIOA Youth Telephone Verification****IDENTIFYING INFORMATION**

Applicant's Name: \_\_\_\_\_  
Last First MI  
Participant ID: \_\_\_\_\_ Application Date: \_\_\_\_\_

**NOTE:** In addition to eligibility items, this form may be used to document other information. Be sure to clearly mark the appropriate reason for using the Telephone Verification – ELIGIBILITY ITEM or OTHER

**TELEPHONE VERIFICATION**

TELEPHONE VERIFICATION USED FOR: ☐ ELIGIBILITY ITEM ☐ OTHER (EXPLAIN) \_\_\_\_\_

SUBJECT TO BE VERIFIED: \_\_\_\_\_ DATE VERIFIED: \_\_\_\_\_

AGENCY OR THIRD PARTY RELATIONSHIP: \_\_\_\_\_

CONTACT NAME: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CERTIFICATION**

I attest that the information recorded by me on this form was obtained through telephone contact on the above date. As indicated by the agent, all information was obtained from data previously determined and recorded in the applicant's records at the agency providing the eligibility verification.

\_\_\_\_\_  
Case Manager Signature

\_\_\_\_\_  
Date



## WIOA Youth Income Eligibility Form: Part I

### IDENTIFYING INFORMATION

Applicant's Name:

Last

First

MI

Participant ID:

Application Date:

Income Period – From (6 months prior to application):

To (application date):

**NOTE – Family Income Calculation:** Complete and attach Part II: Income Calculation, for each family member with earned income during the 6 month income review period. **Documentation of income source(s), family size, and Parts I & II of this form must be in the participant paper case file.**

**Family Composition:** List each family member. Refer to *WIOA Youth Program Eligibility and Data Validation Policy* for help in determining dependent status of applicant. If applicant lives with parents but claims family size of 1 due to providing more than 50 percent of his/her support, then the appropriate section of Attachment C, WIOA Youth Support Form, must also be completed.

Family Member	Name	Relationship	Date of Birth	Age	Income Source(s)	6-Month Income
1		Self/Applicant				
2						
3						
4						
5						
6						
7						
8						

<b>Income Review</b>	Family Size:	Income Limit: <small>* to be taken from 'at or below Poverty Line or 70% LLSIL'</small>	Total 6-Month Income:
			6-Month Income X 2: <small>* to be compared to INCOME LIMIT</small>

<b>Certification</b>	I attest that to the best of my knowledge the above information is true and correct.
----------------------	--

Applicant Signature

Date

Parent/Guardian or Other Responsible Adult Signature (if applicant is under 18)

Date

Case Manager Signature

Date

Family income calculations INCLUDE the following:	Family income calculations EXCLUDE the following:
<ul style="list-style-type: none"> <li>Gross wages and salaries before deductions</li> <li>Net income (gross income minus operating expenses) from a business or other non-farm enterprise</li> <li>Net income from farm self-employment (income from a farm which operates as an owner, renter, or sharecropper, after deductions from farm operating expenses)</li> <li>Social Security Disability Insurance (SSDI)</li> <li>Governmental and non-governmental pensions (including military retirement pay)</li> <li>Regular payments from railroad retirement benefits, strike benefits from union funds, worker's compensation and training stipends</li> <li>Alimony</li> <li>Merit based scholarships, fellowships, and assistantships i.e. the recipient may be determined by students' athletic, academic, artistic or other abilities</li> <li>Dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts, and net gambling or lottery winnings</li> <li>Terminal leave pay, severance pay, or a cash out of accrued vacation leave</li> <li>Disaster Relief Employment wages</li> <li>On-the-Job Training (OJT) wages</li> </ul>	<ul style="list-style-type: none"> <li>Unemployment compensation</li> <li>Child support payments and foster child care payments</li> <li>Old age and survivors' insurance benefits received under section 202 of the Social Security Act (42 U.S.C. 402)</li> <li>Income earned while the veteran was in Active Military Duty, and certain other Veteran's Benefits</li> <li>Federal non-cash benefits such as: Medicare, Medicaid, food stamps, school lunches, and housing assistance</li> <li>Assets drawn down as withdrawals from a bank</li> <li>Public Assistance payments: TANF, SSI, GA, and RCA</li> <li>One time cash payment, which includes: tax refunds, loans, one-time insurance payments or compensation for injury, gifts and lump sum inheritances</li> <li>Job Corps payments</li> <li>Cash value of employer-paid or union-paid portion of health insurance or other employee fringe benefits</li> <li>Cash value of food or housing received in lieu of wages</li> <li>Payments received under the Trade Readjustment Act of 1974</li> <li>Needs-based scholarship assistance</li> <li>Financial assistance under Title IV of the Higher Education Act</li> <li>Stipends received from the following programs: VISTA, Peace Corps, Foster Grandparents Program, Retired Senior Volunteer Program, Youth Works/AmeriCorps Program</li> <li>All WIOA payments except OJT</li> </ul>

## WIOA Income Calculation Worksheet: Part II

## IDENTIFYING INFORMATION

Applicant's Name: \_\_\_\_\_  
 Last First MI  
 Participant ID: \_\_\_\_\_ Application Date: \_\_\_\_\_

**Income Period – From**  
**(6 months prior to application):** \_\_\_\_\_ **To (application date):** \_\_\_\_\_

**Family Member:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

☐ **Straight Pay Method:** Use this method if family member provides all income documents covering income review period.

Employer or Income Source		Pay Date	# Weeks in Time Frame	=	Pay Period Gross Pay
1				=	
2				=	
3				=	
4				=	
5				=	
6				=	
7				=	
8				=	
a) 6-Month Income: Sum of all Pay Period Gross Pays				=	

☐ **Average Pay Method:** Use this method if family member provides at least 2 income documents from each source

Employer or Income Source		Pay Date	Gross Pay	÷	# Weeks in Time Frame*	=	Weekly Gross Income
1				÷		=	
2				÷		=	
3				÷		=	
<b>a) Average Weekly Gross:</b> Sum of Weekly Gross Income ÷ # of Pay Stubs						=	
<b>b) 6-Month Income:</b> Average Weekly Gross x # Weeks Included During Income Review						=	

\* Time Frame: weekly = 1; bi-weekly = 2; monthly = 4.3

☐ **Year-to-Date Method:** Use this method if the family member provides a recent pay stub or income source with the cumulative year-to-date gross income indicated on it.

Employer or Income Source		Pay Date	Cumulative Gross Pay	÷	# Weeks	Cumulative	=	Weekly Gross Income
1				÷			=	
2				÷			=	
3				÷			=	
<b>a) Average Weekly Gross:</b> Sum of Weekly Gross Income ÷ # of Income Document							=	
<b>b) 6-Month Income:</b> Average Weekly Gross x # Weeks Included During Income Review							=	

☐ **Intermittent Work/Other Income Method:** Use this method if the family member has not had steady income from one or more sources during the review period.

more sources during the review period.					
Employer		Description of Work	Start Date	End Date	Total Gross Income
1					
2					
a) 6-Month Income: Sum of all Total Gross Incomes				=	

**WIOA Youth Dropout Status Form****IDENTIFYING INFORMATION**

Applicant's Name:

Last

First

MI

Participant ID:

Application Date:

☐ I HEREBY CERTIFY UNDER PENALTY OF PERJURY, THAT I AM NO LONGER ATTENDING ANY SCHOOL AND THAT I HAVE NOT RECEIVED A SECONDARY SCHOOL DIPLOMA OR ITS RECOGNIZED EQUIVALENT.

Last School Attended:

Location:

Dates of Attendance:

Highest Grade Level Completed:

I ATTEST THAT THE INFORMATION STATED ABOVE IS TRUE AND ACCURATE, AND UNDERSTAND THAT THE ABOVE INFORMATION, IF MISREPRESENTED, OR INCOMPLETE, MAY BE GROUNDS FOR IMMEDIATE TERMINATION FROM THE PROGRAM, REPAYMENT OF ANY FUNDS EXPENDED ON THE PARTICIPANT, AND/OR OTHER PENALTIES AS SPECIFIED BY LAW.

Applicant Signature

Date

Parent/Guardian or Other Responsible Adult Signature (if applicant is under 18)

Date

**CERTIFICATION**

I certify that the information recorded on this form was provided by the individual whose signature appears above.

Case Manager Signature

Date

**List of Acceptable Documents to Verify Eligibility to Work**

***All documents must be unexpired***

**Make sure DACA is covered**

**LIST A: Documents That Establish Both Identity and Employment Authorization**

1. U.S. Passport or Passport Card
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa (MRIV)
4. Employment Authorization Document (Card) that contains a photograph (Form I-766)
5. In the case of a nonimmigrant alien authorized to work for a specific employer incident to status, a foreign passport with Form I-94 or Form I-94A bearing the same name as the passport and containing an endorsement of the alien's nonimmigrant status, as long as the period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form
6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI

**OR**

**LIST B: Documents That Establish Identity**

For individuals 18 years of age or older:

1. Driver's license or ID card issued by a state or outlying possession of the United States, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
2. ID card issued by federal, state, or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
3. School ID card with a photograph
4. Voter's registration card
5. U.S. military card or draft record
6. Military dependent's ID card
7. U.S. Coast Guard Merchant Mariner Card
8. Native American tribal document
9. Driver's license issued by a Canadian government authority

For persons under age 18 who are unable to present a document listed above:

10. School record or report card
11. Clinic, doctor, or hospital record
12. Day-care or nursery school record

**AND**

**LIST C: Documents That Establish Employment Authorization**

1. U.S. Social Security account number card, unless the card includes one of the following restrictions: 1. Not valid for employment, 2. Valid for work only with INS authorization, or 3. Valid for work only with DHS authorization.

*NOTE: A copy (such as a metal or plastic reproduction) is not acceptable.*

2. Certification of Birth Abroad issued by the U.S. Department of State (Form FS-545)
3. Certification of Report of Birth issued by the U.S. Department of State (Form DS-1350)
4. Original or certified copy of a birth certificate issued by a state, county, municipal authority, or outlying possession of the United States bearing an official seal
5. Native American tribal document
6. U.S. Citizen Identification Card (Form I-197)
7. Identification Card for Use of Resident Citizen in the United States (Form I-179)
8. Employment authorization document issued by Department of Homeland Security

**Note: Employment Verification for Deferred Action for Childhood Arrival (DACA) applicants that have been approved are issued an Employment Authorization Document (EAD) card by the U.S. Citizenship and Immigration Service (USCIS) valid for up to two years.**

## YOUTH TRAINING PROVIDER PROCUREMENT FORM

PARTICIPANT INFORMATION			
Applicant's Name: _____			
Last		First	MI
Participant ID: _____		Application Date: _____	

TRAINING PROVIDER #1		TRAINING LOCATION ADDRESS AND PHONE NUMBER	
COURSE OF TRAINING	TOTAL HOURS	TOTAL TUITION AND FEES	
SOURCE OF INFORMATION (choose one)			
CATALOG	WEB PAGE PRINT-OUT (attach)	TELEPHONE QUOTE (attach telephone verification form)	
TRAINING PROVIDER #2		TRAINING LOCATION ADDRESS AND PHONE NUMBER	
COURSE OF TRAINING	TOTAL HOURS	TOTAL TUITION AND FEES	
SOURCE OF INFORMATION (choose one)			
CATALOG	WEB PAGE PRINT-OUT (attach)	TELEPHONE QUOTE (attach telephone verification form)	
TRAINING PROVIDER #3		TRAINING LOCATION ADDRESS AND PHONE NUMBER	
COURSE OF TRAINING	TOTAL HOURS	TOTAL TUITION AND FEES	
SOURCE OF INFORMATION (choose one)			
CATALOG	WEB PAGE PRINT-OUT (attach)	TELEPHONE QUOTE (attach telephone verification form)	

CERTIFICATION	
I certify that the information recorded on this form is accurate and was obtained as indicated by the signature and date below	
Case Manager Signature _____	Date _____

## INDIVIDUAL SERVICE STRATEGY (ISS) CLIENT INVOLVEMENT STATEMENT

### CLIENT INVOLVEMENT STATEMENT

- In consulting with my Case Manager, I have determined that the employment goal and services strategy stated in the ISS developed and dated \_\_\_\_\_ is my choice and is consist with my assessment results.
- I also understand that this is a general plan of services and training and it is neither entitlement nor a contract between the program and the customer at this time.
- I understand that I am responsible for my actions.
- I understand that my goal for completing this plan is to become self-sufficient.

\_\_\_\_\_  
PARTICIPANT'S SIGNATURE

\_\_\_\_\_  
DATE

NAME: \_\_\_\_\_

OSL PID: \_\_\_\_\_

CASE MANAGER: \_\_\_\_\_

OFFICE: \_\_\_\_\_